



NEWS RELEASE

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PLANNING FOR THE UNEXPECTED CREATING A DISASTER PREPAREDNESS KIT

The lessons learned in our recovery from Hurricanes Katrina and Rita are too many to ignore. **It's worth the time to develop a consolidated, orderly plan for the unthinkable.** THERE'S NO QUESTION THAT THESE TOOLS MAKE A LOT OF SENSE.

This information may be organized in a pre-purchased kit, a school binder, or in scanned documents stored on a computer disk and kept in a safe accessible place at home, with your attorney or certified financial planner and possibly with a trusted friend or relative who lives a safe distance away from your location. Set a time each year to review and revise this information. Your address, relationship, job status and financial details can certainly change in a given year.

An index of this data should include but not limited to the following data:

- Birth, death, marriage certificates (make a note to the holder of this file that they should immediately order at least ten official copies of each in case they are executor or are asked to help an executor)
- Divorce decrees with all relevant settlement information
- Location of wills, trusts, and any power of attorney information
- Advanced health-care directives
- Adoption papers, if applicable
- Key identification numbers, including driver's license, passport, and employee identification data
- Recent bank and brokerage statements
- Detailed funeral and burial wishes
- Location of cash that may be used to handle emergency expenses
- Recent medical records that may be good to have on hand if the individual is incapacitated
- Copies of residential deeds and mortgage data
- Car title, lease, loan information, and license plate data
- All insurance policy (health, disability, and life) and agent contact information
- Photocopies of credit and debit cards, front and back (displaying the individual's signature)
- A current copy of the individual's home financial software program reflecting up-to-date financial data
- The locations for all critical paper documents and stocks and bonds
- Where safe-deposit, lockbox, and filing cabinet keys are
- Contact information for the individual's human resources department at work
- Location of tax returns for the last three years
- All relevant contact numbers for executors, financial advisers, trustees, guardians, attorneys, and other pertinent individuals
- All user IDs and passwords for online accounts, including access to computer
- Guidelines on what to do about orphaned pets, including set plans for who will adopt them and pay for their care

If family members or advisors have questions or suggestions on how to better present this data, those ideas should be incorporated as time goes on.

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